

System Configuration

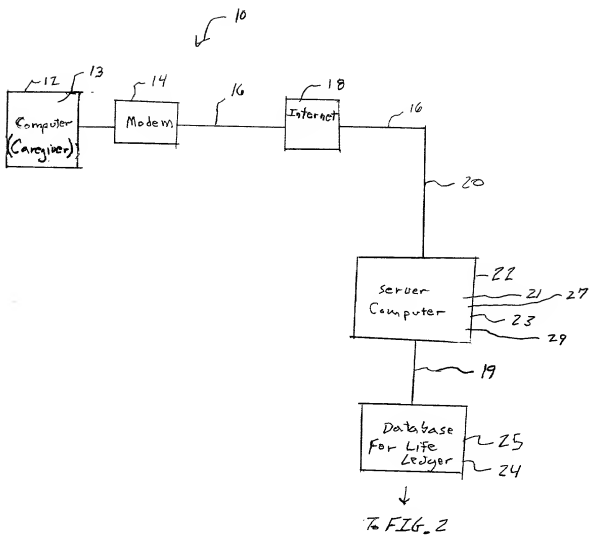


FIG. 1

(25, 30 Database Tables

art_dates	diagnoses	medications
art_id	diagnosis_id	medication_id
art_title	client_id	client_id
art_sub_title	date_dap	dosed_name
art_body	date_dag	dosed_doseage
art_date_created	diag_code	dosed_frequency
art_author_id	diag_description	dosed_med_reason
art_status	diag_physician	dosed_med_reason
art_date_admin		med_start
art_cancel_by		med_class
art_is_featured		med_physician

```
users
  user_id
  user_first
  user_last
  user_email
  user_password
  user_date_created
  user_date_last_visited
  user_date_access_start
  user_date_access_end
  user_type
  user_status
  customer_id
  user_screen_name
```

benefits_group	benefits_group_id	description	primary_contact	code	discount	discount_percentage	flat_rate	prod_id	email
----------------	-------------------	-------------	-----------------	------	----------	---------------------	-----------	---------	-------

FIG. 2

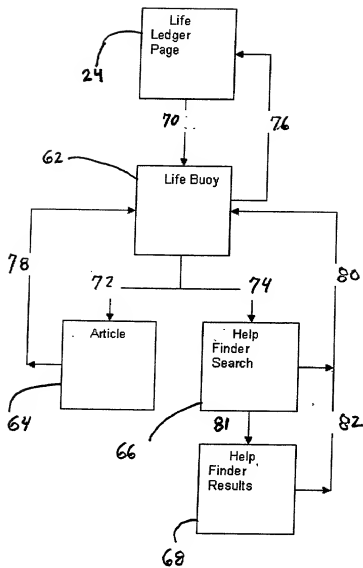


FIG. 3

Welcome!

Member Login

Email:
Password:

- You are Logged Out

The information you need to care for those you love.

Elderissues.com's Life Ledger™ helps you provide care for your loved ones through an easy to use knowledge management system.

Our innovative method lets you build a personal database of all life and health-related information, including basic information such as name and address, address, first language spoken, medications currently prescribed, etc. to a full medical and insurance history, listing of physicians and even financial information and funeral planning requests.

When needed, you can make this information accessible to other family members, doctors, hospitals, or any other caregiver you choose. The access can be temporary, as well as limited to only the sections needed. For example, a doctor could be given access for two days to the medications section, which the financial and funeral arrangements sections are kept private.

To help you along the way, we've also provided "Life Buoys," useful information pertaining to each section, as well as an extensive filled with useful articles.

Take the Tour to familiarize yourself with how it works.

Home | [Contact Us](#) | [Privacy Statement](#)
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FIG. 4.



Learn about
Life Ledger >>

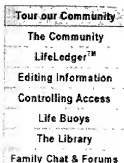


Extensive Library of
Information >>



Let our Life
Buoys help
you along the
way >>

ElderIssues Tour



Tour our Community

ElderIssues.com offers a variety of services for families. This tour will show you how easily you can use our services and it will help you understand how we can assist you!

ElderIssues

Maintaining personal records has never been easier. With ElderIssues.com, you can view and update your personal information from any place in the world that you have access to the Internet.

BEGIN THE TOUR



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FIG. 5



ElderIssues Tour

Tour our Community

The Community

LifeLedger™

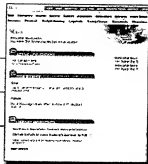
Editing Information

Controlling Access

Life Buoys

The Library

Family Chat & Forums



The Elder Issues.com Community

Once you become a member, just log in and you'll be directed to your personalized Home Page where you'll enjoy unlimited access to all our valuable services. Employers and sponsors provide memberships. Individuals and their families may also join.

Learn About Our Services:

- 1 LifeLedger - Organize and track personal information - your own or a loved one's. Keep all records confidential, current and safe. View and provide authorized access anywhere in the world, to one file or several files.
- 2 Library - Browse through our many categories and articles until you find the ones that you need.
- 3 Family Chat & Forums - Share, learn and have fun with other members and their families as you discuss and solve family situations...

< BACK | RESTART TOUR NEXT >

ElderIssues Tour

Tour our Community
The Community
LifeLedge™
Editing Information
Controlling Access
Life Buoys
The Library
Family Chat & Forums

General Information		Edit	Phone	Edit
Basic Care Pay				
Address 1 123 Main St.				
Address 2 Suite 10				
11111 Palm Beach, FL				
City/State 33401				
Phone 561 835-4040				
Phone 2 561 835-4141				
To Care Set 561-123-1234				
Number				
Only up to Jan 1, 2000				
Box 101				
City/State Philadelphia, PA, USA				
Gender Female				
Health Status Married				
Mailing Address		Edit		
Address 1 PO Box 1550				
City/State 33401				
City/State Palm Beach Gardens, FL				

LifeLedge™

The unique LifeLedge is a personal information record available anywhere in the world in which there is Internet access.

Each member owns a secured LifeLedge. The member can use this resource personally or for a loved one. The LifeLedge is a central resource for a broad range of vital information.

Life examples explain best:

Bob, a member, is out of town and learns his mother is sick. Her new doctor needs to know her medications and history. Bob accesses his account that contains her LifeLedge. He faxes her medication sheet to her doctor. When Bob's mother has to go to the hospital, "Who will walk the dog?" He also finds that number in the LifeLedge and asks the doctor to let his mother know that the dog is taken care of so she only has to worry about getting better.

Membership entitles the member to one LifeLedge. Additional LifeLedges can be purchased.

LifeLedge is secure, personal and needed information only a "web-click" away...

◀ BACK | RESTART TOUR | NEXT ▶

FIG. 7

ElderIssues Tour

[Tour our Community](#)
[The Community](#)
[LifeLedger™](#)
[Editing Information](#)
[Controlling Access](#)
[Life Buoys](#)
[The Library](#)
[Family Chat & Forums](#)

General Information		Edit	Photo	Edit
Name: Gene Ray				
Address: 123 Main St.				
Address 2: Suite 10				
City: West Palm Beach, FL				
State: FL				
Zip: 33401				
Phone: 561 833-4040				
Email: 561 833-4141				
Date of Birth: 5/1/1950				
Age: 50				
Sex: Male				
Mailing Address: 45678 Po Box 1500				
City: West Palm Beach Gardens, FL				
State: FL				
Zip: 33411				
Phone: 561 833-4040				
Email: 561 833-4141				

Simply
Click to
update the
information

Editing Your LifeLedger™ Information

Of course keeping your LifeLedger information accurate is essential, so we've made editing as simple as possible. Clicking the "Edit" button next to each area of information will take you to an editing page that looks like the image below. Make your changes and click the "Save" button at the bottom of the screen, your changes will be updated automatically.

Edit General Info	
First Name:	Gene
Last Name:	Ray
Address 1:	123 Main St.
Address 2:	Suite 10
City:	West Palm Beach
State:	FL
Zip:	33401
Phone:	561 833-4040

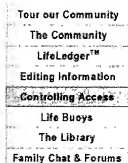
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FIG. 8



ElderIssues Tour



Edit Access Control for Phil Harrington:

Budget Planning Access Level	<input type="radio"/> None <input type="radio"/> Read Only <input type="radio"/> Read/Write
Legal Information Access Level	<input type="radio"/> None <input type="radio"/> Read Only <input type="radio"/> Read/Write
Funeral Planning Access Level	<input type="radio"/> None <input type="radio"/> Read Only <input type="radio"/> Read/Write
Documents Access Level	<input type="radio"/> None <input type="radio"/> Read Only <input type="radio"/> Read/Write
Physicians Access Level	<input type="radio"/> None <input type="radio"/> Read Only <input type="radio"/> Read/Write
Access Start Date	<input type="text" value="4"/> <input type="text" value="2"/> <input type="text" value="2003"/>
Access End Date	<input type="text" value="4"/> <input type="text" value="2"/> <input type="text" value="2003"/>
<input type="button" value="Delete"/> <input type="button" value="Save"/>	

Controlling Access

You can grant other people access to your LifeLedger information.

For Example: Bob's mother visits her financial planner who manages her money. Bob and his mom decided to allow her financial planner to view and update her investments. He is granted "Read/Write" access to this area. This saves Bob time and he is able to keep an eye on any account changes. However, the financial planner does not require access to the Physician sections and therefore has no access to these areas.

Once you're logged in, just click the level of access you would like each person to have: "None," "Read Only," or "Read/Write" for full control of viewing and/or updating personal information.

◀ BACK | RESTART TOUR | NEXT ▶



ElderIssues Tour

[Tour our Community](#)
[The Community](#)
[LifeLodger™](#)
[Editing Information](#)
[Controlling Access](#)
[Life Buoys](#)
[The Library](#)
[Family Chat & Forums](#)

Click the
Life Buoys
symbol for more
information on
that topic

General Information		Edit	Photo	Edit
Name Gene Ray				
Address 1 123 Main St				
Address 2 Suite 10				
City/Town West Palm Beach, FL				
Zip 33401				
Phone 561 833-4040				
Phone 2 561 833-4141				
Cell 561 561-123-1234				
Birthday				
Date of Birth Jan 1, 1960		Age 101	Mailing Address Edit	
Address 1 Philadelphia, PA, USA				
Address 2				
Gender Female				
Marital Status Married				
Address 3 PO Box 1530				
City/Town Palm Beach Gardens, FL				

Life Buoys

Let our Life Buoy's help you along the way!

[◀ BACK | RESTART TOUR](#) [NEXT ▶](#)

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FIG. 10



ElderIssues Tour

Tour our Community

The Community

LifeLedger™

Editing Information

Controlling Access

Life Buoys

The Library

Family Chat & Forums

Library

- [ElderIssues.com](#)
- [LifeLedger™ Tools](#)
- [LifeLedger™](#)
- [LifeLedger™](#)
- [LifeLedger™](#)

Articles without a category:

- [Alzheimer's](#)
- [Alzheimer's Care](#)
- [Community Based Resources](#)
- [Current Power of Attorney](#)
- [Estate](#)

- [Health Issues](#)
- [Hemiparesis Complications](#)
- [Lactating Breast Syndrome](#)
- [Lactation](#)
- [Lifespan: How Long Will A Person Live?](#)
- [Life Insurance](#)
- [Social Security & Financial Issues](#)
- [What's in the Law Library](#)

The Library

Our Library is regularly updated and maintained to provide our members with current and reliable information. Browse our large listing of articles for information about elder issues. Select a Category such as: Caregivers, Doctors, Conditions, Medicare, Social Security and much more!

< BACK | RESTART TOUR | NEXT >

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FIG. 11

ElderIssues Tour

Tour our Community

The Community
LifeLedger™

Editing Information

Controlling Access

Life Buoys

The Library

Family Chat & Forums



Family Chat & Forums

Share, learn and have fun with other members and their families as you discuss and solve family situations.

Communicate immediately with people from all over the world. You may join in public discussions in a room or talk privately to one person at a time -- like sitting in front of your computer and "talking" through typed messages with either one person or many other members!

Threaded Forum		
subject	By	Date Posted
anybody else having memory loss issues w/ parent?	Gene Ray	26-Apr-0
Driving tip: my experience	Gene Ray	26-Apr-0
Mother refuses to eat	Gene Ray	05-Apr-0
Seeking advice for Critical Care situation	Gene Ray	03-Apr-0

Note: Only ElderIssues.com subscribers have access to the chat and forums.

[JOIN NOW](#)

Join ElderIssues.com

Maintaining personal records has never been easier. With ElderIssues.com, you can view and update your personal information from any place in the world that you have access to the Internet.

Step 1: Group or Individual?

Individual

Click Individual to Continue.

INDIVIDUAL

Group

Enter Group Code, then click Group to Continue.

GROUP

Joining is easy:

1. Chose if you're joining as a group or individual (if you're joining as part of a group, enter the group code).
2. Enter your personal information.
3. Choose how many life ledgers you would like to purchase.
4. Confirm.
5. Provide payment information.

Once your payment is processed you will be able to log in as a member.

Frequently Asked Questions

About Elder Issues

What is the privacy statement in simple terms.

Life Ledgers

How do I edit budget info?

What are "Notes" used for?

How do I upload a document?

What formats can I use for my document?

How can I get my document into the proper format?

About Elder Issues

Q. What is the privacy statement in simple terms.

A. In simple terms, your information is secure on our web site, and we do not share it with anyone unless you tell us to.

Related Links

<http://www.elderissues.com/index>

[Top](#)

Life Ledgers

Q. How do I edit budget info?

A. Make sure you are logged in (see "how do I log in"). Once you are logged in, you should see your lifeledger tabs, click on the budget tab... etc.

[Top](#)

Q. What are "Notes" used for?

FIG. 4

- A. The "Notes" area at the top of each Life Ledger page is meant for items that don't fit into any of the fields on that page, or for reminders to yourself as you're working.

[Top](#)

Q. How do I upload a document?

- A. First your document should be saved in a file format that works well with the web. A .jpg file or a .gif is usually the best, but you could also use a Word document (.doc) or a .pdf format.

Once you have your document saved in the proper format, simply go to the "documents" tab in your Life Ledger area.

Click the "Upload A Document" link at the bottom of the page.

Click the "Browse" button. This will give you a window for navigating to and selecting the file you wish to upload. Once you have selected the document to upload, click the "OK" button in that window. The field next to "Pick A File" will be filled in with the path to the file you selected.

Click the "Save" button.

If everything goes well, you should see a message saying "File Uploaded!"

[Top](#)

Q. What formats can I use for my document?

- A. The best format for your document is a format that works well on the web. Examples are:

JPG Images
GIF Images
HTML Files
Text Files

Also you can use:

PDF Documents

FIG. 15

Most people have computers that can read these formats.

[Top](#)

Q. How can I get my document into the proper format?

- A.** If you have a hard copy of a document, it is best to scan that document. This can be done if you have a scanner. Also, most copy centers have scanners available with helpful staff. Scan your file into the computer then save the file as whatever format you would like.

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FIG. 16

Contact Us

Elderissues.com, Inc.
2200 N. Federal Highway
Suite 202
Boca Raton, FL 33431-7755

Email Us

Name:

Address:

City state ZIP/Postal:

Country:

Phone Number:

FAX Number:

Email Address:

Regarding:

Comments:

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FIG. 17

Log In

Email Address:

Password:

Remember me? ☒ (What's this?)

[Log In](#)

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FIG. 18

[Main Page](#) • [Forum](#) • [Chat](#) • [Access Control](#)Active Life Ledger: [Gene Ray](#)[Emergency](#)[General](#)[Support People](#)[Medical](#)[Health Status](#)[Insurance](#)[Financial](#)[Budget Planner](#)[Legal](#)[Funeral Planing](#)[Documents](#)[Physicians](#)

Main

Welcome back



ACTIVE LIFELEDGERS

Gene Ray**Jeff Jones****[Purchase Additional Life Ledgers!](#)**

COMMUNITY

Chat

Communicate immediately with people from all over the world.

Forum

Interact with fellow ElderIssues.com members by posting and reading messages.

Options:

[Change Password](#)[Update Screen Name](#)[Home](#) | [Contact Us](#) | [Privacy Statement](#)

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FIG. 19

Access Control

- [Gene Ray](#) [Add](#)
 - [Tami Boden](#) [Edit](#) [Delete](#)
 - [Phillip Harrington](#) [Edit](#) [Delete](#)
 - [patty ray](#) [Edit](#) [Delete](#)
 - [jon bbbb](#) [Edit](#) [Delete](#)
 - [jon bbbb](#) [Edit](#) [Delete](#)
- [Jeff Jones](#) [Add](#)
 - [Nehal](#) [Edit](#) [Delete](#)

Main Page • Forum • Chat • Access Control

Active Life Ledger: Gene Ray

Emergency General Support People Medical Health Status Insurance
 Financial Budget Planner Legal Funeral Planning Documents Physicians

Emergency Info

General Information

Name Gene Ray
 Address 1 123 Main St.
 Address 2 Suite 10
 City/ST/Zip West Palm Beach, FL 33401
 Phone 561 833-4040
 Phone 2 561 833-4141
 Date of Birth Jan 1, 1900 Age 101
 Birth Place Paris, London
 Gender Female
 Soc Sec Number: 561-123-1234
 Marital Status Married
 Ethnic Origin Indian (East Asian)
 Religion Prodestant

Photo

Health Care POA

Responsible Party

Name Joe Friendly
 Relationship fdafdafdaf
 Phone 561 555-1212
 Phone 2 555-1212

HMO

Name Phil's HMO
 HMO Center Atlanta

Policy Number 56186486315861
 Authorization Phone 800-400-5000

Notes: Hello

Medicare

SS #
 Medicare # 12348M

Enrolment Date 05/10/1999
 Group # 56864

Notes: Hello.

Non Medicare

Long Term Care Insurance

FIG. 21

Physicians

Clay Williams

Specialty

Phone 561 833-4040

Note Hello! This is a pharmacy now too!

Phone 2 no

Assign: NO

Joe Old's Hello

Specialty

Phone 561 555-1212

Note Leaky faucet. Call plumber.

Phone 2

Assign: NO

Joe Friendly

Specialty

Phone 561 555-1212

Note This is a very friendly place! "

Phone 2 555-1212

Assign: NO

Phil Hello

Specialty

Phone

Note What a great doctor!

Assign: NO

Allergies

Drug

Amoxophyn

Penicillin

Food

shellfish

Other

cats

Diagnoses

Date Diagnosed

06/01/2001

01/01/2000

Diagnosis Code

123-57

112-58

Description

Hypertension

Fractured left hip

Physician

Jones

Smith

Medications

Name	Dosage	Frequency	Time of Day	Reason	Start Date	Physician	Class
Tenormin	50mg	once a day	Evening	hypertension	06/01/2000	Smith	A
Tylenol	500mg	as needed		pain, discomfort			D

Hospitalizations

Date In	Date Out	Hospital	Reason
04/05/2001	05/05/2001	St. Jude's	Seriously Ill

Documents

File Name	Date Uploaded	Uploaded By	Date Updated	Updated By
Hello (click to view)	18-Apr-01	Test Testerly	18-Apr-01	Test Testerly
Living Will (click to view)	02-Jul-01	Test Testerly		
m2_physicianso.gif (click to view)	18-Apr-01	Test Testerly		
philstest.jpg (click to view)	10-Jul-01	Test Testerly		

Main Page · Forum · Chat · Access Control

Active Life Ledger: Gene Ray

Emergency **General** Support People Medical Health Status Insurance
 Financial Budget Planner Legal Funeral Planing Documents Physicians

General Info

Notes

 Edit Notes

Remember to update phone number after move. - Bill

General Information

[Edit](#) Photo

[Edit](#)

Name Gene Ray
 Address 1 123 Main St.
 Address 2 Suite 10
 City/ST/Zip West Palm Beach, FL 33401
 Phone 561 833-4040
 Phone 2 561 833-4141
 Soc Sec Number: 561-123-1234
 Date of Birth Jan 1, 1900 Age 101
 Birth Place Paris, London
 Gender Female
 Marital Status Married
 Ethnic Origin Indian (East Asian)
 Religion Prodestant
 Occupation Farmer
 Education 14 Years
 Spouse Jane
 Father Geoffery
 Mother Gwen
 Veteran Air Force
 Rank Captain
 Serial Number 12456789
 Date Enlisted Jan 1, 1920
 Date Discharged Jan 1, 1926

Mailing Address

[Edit](#)

Address 1 PO Box 1530
 Address 2
 City/ST/Zip Palm Beach Gardens, FL 33418
 Phone 561 555-1212
 Notes Leaky faucet. Call plumber.

Current Living Arrangements

[Edit](#)

Admitted Jan 10, 1950
 Facility Greener Pastures
 Address 1 4610 Long Lake Dr.
 Address 2
 City/ST/Zip West Palm Beach, FL 33401
 Phone 561 555-1212
 Directions Go North on I95
 Notes This is a great facility. I recommend it.

Facility Contacts

[Add](#)

FIG. 23

[Main Page](#) • [Forum](#) • [Chat](#) • [Access Control](#)
Active Life Ledger: [Gene Ray](#)
[Emergency](#) [General](#) [Support People](#) [Medical](#) [Health Status](#) [Insurance](#)
[Financial](#) [Budget Planner](#) [Legal](#) [Funeral Planing](#) [Documents](#) [Physicians](#)

Support People

Notes

 [Edit Notes](#)

My notes test

Responsible Party

[Edit](#)

Emergency Contact

[Edit](#)

Name Joe Friendly
 Relationship fdafdafdaf
 Address 1 123 Main St.
 Address 2 Suite 10
 City/ST/Zip Boca Raton, FL 33333
 Phone 561 555-1212
 Phone 2 555-1212
 Notify if Emergency: **YES** Notify if Death: **NO**
 Notes This is a very friendly place! "

Name Phil Harrington
 Relationship
 Address 1
 Address 2
 City/ST/Zip ,
 Phone
 Notify if Emergency: **NO** Notify if Death: **NO**
 Notes Whoa!

Support Providers

[Add](#)

Joe Friendly [Edit](#)
 Relationship fdafdafdaf
 Address 1 123 Main St.
 Address 2 Suite 10
 City/ST/Zip Boca Raton, FL 33333
 Phone 561 555-1212 Phone 2 555-1212
 Notify if Emergency: **YES** Notify if Death: **NO**
 Notes This is a very friendly place! "

Macklin Doherty [Edit](#)
 Relationship
 Address 1 4610 Long Lake Dr.
 Address 2
 City/ST/Zip West Palm Beach, FL 33401
 Phone 561 555-1212 Phone 2
 Notify if Emergency: **YES** Notify if Death: **NO**
 Notes This is a great facility. I recommend it.

Support Hello

[Edit](#)

Relationship
 Address 1 Support Rd.
 Address 2 Providers
 City/ST/Zip West Palm Beach, FL 33401
 Phone 561 555-1212
 Notify if Emergency: **NO** Notify if Death: **NO**

FIG. 24

Notes support provider.

Aides

Add

Joe Old's Hello

Edit

Phil Harrington

Edit

Aide Phone 561 555-1212

Aide Phone

Agency Hello

Agency

Agency Phone

Agency Phone

Schedule Leaky faucet. Call
plumber.

Schedule Whoa!

Notify if Emergency:

Notify if Emergency:

Notify if Death:

NO

Notify if Death: **NO**

NO

NO

Notes Leaky faucet. Call
plumber.

Notes Whoa!

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FIG. 25

[Main Page](#) · [Forum](#) · [Chat](#) · [Access Control](#)
Active Life Ledger: [Gene Ray](#)[Emergency](#)[General](#)[Support People](#)[Medical](#)[Health Status](#)[Insurance](#)[Financial](#)[Budget Planner](#)[Legal](#)[Funeral Planning](#)[Documents](#)[Physicians](#)

Medical

Notes

 [Edit Notes](#)

Hello

[Add](#)

Allergies

Drug

Amoxophyn

Penicillin

Food

shellfish

Other

cats

Diagnoses

[Add](#)

Date Diagnosed

06/01/2001

01/01/2000

Diagnosis Code

123-57

112-58

Description

Hypertension

Fractured left hip

Physician

Jones

Smith

[Edit](#)[Edit](#)

Medications

[Add](#)

Name	Dosage	Frequency	Time of Day	Reason	Start Date	Physician	Class
Tenormin	50mg	once a day	Evening	hypertension	06/01/2000	Smith	A
Tylenol	500mg	as needed		pain, discomfort			D

[Edit](#)[Edit](#)

Pharmacies

[Add](#)

Forte

[Edit](#)

Hello

[Edit](#)

Name Clay Williams

Address 1 123 Main

Address 2 Suite 115

City/ST/Zip West Palm Beach, FL 33401

Phone 561 833-4040

Phone 2 no

Notes Hello! This is a pharmacy now too!

Name Joe Old's Hello

Address 1 PO Box 1530

Address 2

City/ST/Zip Palm Beach Gardens, FL 33418

Phone 561 555-1212

Phone 2

Notes Leaky faucet. Call plumber.

Main Page · Forum · Chat · Access Control

Active Life Ledger: Gene Ray

Emergency General Support People Medical **Health Status** Insurance
 Financial Budget Planner Legal Funeral Planning Documents Physicians

Health Status

Notes

 Edit Notes

This guy is pretty health

Hospitalizations

Date In	Date Out	Hospital	Reason	Add
04/05/2001	05/05/2001	St. Jude's	Seriously Ill	Edit

Nursing Home/Rehab Adminssions

Date In	Date Out	Facility	Reason	Add
05/26/2001	05/26/2001	St. Andrews	Stroke	Edit

Weight

Date In	Pounds	Gain/Loss	Add
05/26/2001	125	0	Edit

Health Status

[Edit](#)

Skills Assessment

ADL Skills Notes

Walking: Independent
 Transferring: Independent
 Bathing: Independent
 Dressing: Independent
 Grooming: Independent
 Toileting: Independent
 Feeding: Independent

Toileting

Toileting Independent: Yes	Depends/Diapers Yes
Incontinent Bladder: Yes	Catheter: Yes
Incontinent Bowel: Yes	Colostomy: Yes
Toileting Notes:	

IADL Skills Assessment

IADL Skills Notes

Driving: Independent
 Shopping: Independent
 Housekeeping: Independent
 Transportation: Independent
 Meal Preparation: Independent

FIG. 27

Financial Management: Independent
Medication: Independent
Use of Phone: Independent
Laundry: Independent

Communication

Speaks English: Yes
Speech Impairment: Yes
Speech Notes:

Other Language:

Required Equipment

☒ Visual Impairment: None

☒ Auditory Impairment: None

Hearing Aid Insurance: Yes

☒ Dental:

Ambulation:

☒ Other:

Equipment Notes:

Visual Equipment

Hearing Aids:

Renewal Date: (m/d/yyyy)

Appliances:

Home Environment

Extra Key: Yes

Emergency Response System: Yes

Double Bannister: Yes

Floors Clear: Yes

Smoke Alarm: Yes

Telephone Next To Bed: Yes

Kitchen Modifications: Yes

Pets In Home: Yes

Veterinarian: Yes

Vet Name fname lname

Phone phone

Phone 2

Emergency Number Posted: No

Stairs: Yes

Lighting Sufficient: Yes

Extra Key Location: 1

Meds Orderly: Yes

Toilet Modifications: Yes

Bathroom Grab Bars: Yes

Pet Type: 1

Pet Name:

Address 1 addy1

Address 2 addy 2

City, State ZIP/Postal city, state, zip

[Edit](#)

☒ Cognitive Status

Orientation:

☒ Memory

Short Term: Poor

Mid Term: Poor

Long Term: Poor

Cognitive Notes:

Judgement: Poor

Concentration: Poor

Insight: Poor

☒ Psycho-Social Status

Past

Occupation/Interests

FIG. 28

Self Esteem Poor, Poor
Grieving: Poor, Poor
Tobacco: Yes
Drugs: Yes
Behavior
Problems/Comments:

Recent Stress:
Reason for Grief:
Alcohol: Yes

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FIG. 29

[Main Page](#) · [Forum](#) · [Chat](#) · [Access Control](#)
[Active Life Ledger:](#) [Gene Ray](#)
[Emergency](#) [General](#) [Support People](#) [Medical](#) [Health Status](#) [Insurance](#)
[Financial](#) [Budget Planner](#) [Legal](#) [Funeral Planing](#) [Documents](#) [Physicians](#)

Insurance

HMO

Name Phil's HMO
HMO Atlanta
Center

Policy Number 56186486315861
Authorization Phone 800-400-5000

Notes: Hello

[Edit](#)

Medicare

SS #
Medicare
12348M

Enrolment Date 05/10/1999
Group # 56864

Notes: Hello.

[Edit](#)

Medicare Supplement

[Edit](#)

Dental Insurance

[Edit](#)

Prescription Insurance

[Edit](#)

Company: PresInsure, Inc.
Policy Number: 1234831538431

Address 1 10 East 10th Street
Address 2 Suite 10
City/ST/Zip Tenbucktoo, FL 33480

Phone 800-706-7066 Phone 2 10-10-220

Notes: Co-pay: \$5

Long Term Care Insurance

[Edit](#)

Auto Insurance

[Edit](#)

Company: Hello
Policy Number: Helloal
Phone 45678123 Phone 2 4567891233
Auto Make: Nissan
Auto Model: Sentra
Auto Year: 1988
Auto Color: Brown

Address 1 Whoa
Address 2 Testing
City/ST/Zip Hey, Party Hello
Registration Number 4864513
Registration Year 2001
State Registered CA

Notes: I sold this car back in 2000 - I don't know what happened to it after that

FIG.30

Home Owners Insurance

Other Insurance

[Edit](#)

[Edit](#)

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FIG. 31

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Financial

Notes

 [Edit Notes](#)

Banks

Bank Grand Bank Of Florida
Branch East Ave Branch

Bank Bank of America
Branch East Ave Branch

Account Number 4567-45678805

Safe Deposit **NO**

Account Number

Safe Deposit **YES**[Testing](#)[Add](#)[Edit](#)[Edit](#)

Brokerage

Brokerage The Friendly Place

Branch fdafdafdaf

Name Joe Friendly

Address 1 123 Main St.

Address 2 Suite 10

City/ST/Zip Boca Raton, FL 33333

Phone 561 555-1212 Phone 2 555-1212

Notes This is a very friendly place! "

[Edit](#)

Trust Company

[Edit](#)

Trust Company Hello

Branch

Name Joe Old's Hello

Address 1 PO Box 1530

Address 2

City/ST/Zip Palm Beach Gardens, FL 33418

Phone 561 555-1212 Phone 2

Notes Leaky faucet. Call plumber.

Trustee

[Edit](#)

Name Trustee Trustee

Address 1 Trustee

Address 2 Trustee

City/ST/Zip Trustee, Trustee Trustee

Phone Trustee

Notes Trustee

Financial Advisor

[Edit](#)

Name Pharm Pharm

Address 1 158 Main St.

Address 2 Suite 10

City/ST/Zip Watsonville, CA 95076

Phone

Notes

Accountant

[Edit](#)

Name Hello Whoa

Address 1 Hello

Address 2 Testing1

City/ST/Zip Testing, 'l';l;af testing Hello

Phone Whoa!

Notes Hello ' whoat

Life Insurance

[Add](#)

Company Lifeco

Face 1,000,000.00

Type: Whole Life

[Edit](#)

F16.31

[Main Page](#) • [Forum](#) • [Chat](#) • [Access Control](#)
Active Life Ledger: [Gene Ray](#)
[Emergency](#) [General](#) [Support People](#) [Medical](#) [Health Status](#) [Insurance](#)
[Financial](#) **[Budget Planner](#)** [Legal](#) [Funeral Planing](#) [Documents](#) [Physicians](#)

Budget Planner

Notes

aaaaaaaaaaaaa

[Edit](#) | [Add New Period](#)

	First 1/4 2001	Second 1/4 2001	Hello There	Month 2
Assets				
Smith Barney	900,000.00	875,000.00	0.00	0.00
Total Assets:	900,000.00	875,000.00	0.00	0.00
Income				
Social Securirty	1,400.00	1,400.00	0.00	0.00
Pension	2,000.00	2,000.00	0.00	0.00
Total Income:	3,400.00	3,400.00	0.00	0.00
Expenses				
Rent	1,500.00	1,800.00	0.00	0.00
Utilities	300.00	400.00	0.00	0.00
Medical Exp	500.00	700.00	0.00	0.00
Total Expenses:	2,300.00	2,900.00	0.00	0.00
Difference:				
	1,100.00	500.00	0.00	0.00

Note: Budget deficits are in Red; surplus is in Green.

[Main Page](#) · [Forum](#) · [Chat](#) · [Access Control](#)
Active Life Ledger: [Gene Ray](#)
[Emergency](#) [General](#) [Support People](#) [Medical](#) [Health Status](#) [Insurance](#)
[Financial](#) [Budget Planner](#) [Legal](#) [Funeral Planing](#) [Documents](#) [Physicians](#)

Legal

Notes

 Edit Notes

Legal Information

[Edit](#)

Guardian

[Edit](#)

Living Will: **YES** Do Not Resuscitate: **NO**
 Trust: **NO** Florida Will: **YES**
 FL Trust TIN Number: fdafdafd
 Court afdafdafda
 Case Number fdafdafdafdaf

Name Phil The Guardian Phil The Guardian
 Address 1 Phil The Guardian
 Address 2 Phil The Guardian
 City/ST/Zip Miami, FL 33410
 Phone
 Notes

Power of Attorney

[Edit](#)

Health Care POA

[Edit](#)

Name POA POA
 Address 1 POA
 Address 2 POA
 City/ST/Zip POA, POA POA
 Phone POA Phone 2
 Notes POA POA

Attorney

[Edit](#)

Name Phil Harrington
 Address 1
 Address 2
 City/ST/Zip ,
 Phone
 Notes Whoa!

[Main Page](#) · [Forum](#) · [Chat](#) · [Access Control](#)
Active Life Ledger: [Gene Ray](#)
[Emergency](#) [General](#) [Support People](#) [Medical](#) [Health Status](#) [Insurance](#)
[Financial](#) [Budget Planner](#) [Legal](#) [Funeral Planning](#) [Documents](#) [Physicians](#)

Funeral Planning


Notes

[x](#) [Edit Notes](#)

This funeral will be very solemn.

Death Certificate Info

[Edit](#)

 Soc Sec Number: 561-123-1234
 Date of Birth Jan 1, 1900 Age 101
 Birth Place Paris, London
 Gender Female
 Marital Status Married
 Ethnic Origin Indian (East Asian)
 Religious Preference Prodestant

Date of Death
 Veteran Air Force
 Rank Captain
 Serial Number 12456789
 Date Enlisted Jan 1, 1920
 Date Discharged Jan 1, 1926
 Occupation Farmer
 Education 14 Years
 Spouse Jane
 Father Geoffery
 Mother Gwen

Services

Greener Pastures

[Edit](#) [Details](#)
[Edit](#)

Address 1 4610 Long Lake Dr.
 Address 2

City/ST/Zip West Palm Beach, FL 33401
 Phone 561 555-1212 Phone 2
 Notify if Death: **NO**

Contract
 Number 458B05XQZ1

Pre Paid: **NO**
 Embalming: **YES**

Disposition Burial
 Casket Half Open Party Style
 Viewing: **YES**

Place of Service Our Lady Of West Palm Beach

Type of Service USAF

Additional Services None

Clergy

[Add](#)

Rev. Phil The man!

[Edit](#)

Monseniour Williams

[Edit](#)

Phone

Phone 2

Phone 5135131

Phone 2 523123fda

Cemetery Company

[Edit](#)

Out of Town Burial

[Edit](#)

Company

Company

FIG. 3 5

Address 1
Address 2
City/ST/Zip ,
Phone

Address 1
Address 2
City/ST/Zip ,
Phone

Monument Company [Edit](#)

Company Whoa!
Address 1
Address 2
City/ST/Zip ,
Phone

Family/Friends to Be Notified Upon Death

[Add](#)

Phil Harrington

[Edit](#)

Macklin Doherty

[Edit](#)

Name Phil Harrington
Address 1 1423458
Address 2 jkf;daO
City/ST/Zip jkl;djafkl;da, q jfdla
Phone 5656655 Relationship Son

Name Macklin Doherty
Address 1 4610 Long Lake Dr.
Address 2
City/ST/Zip West Palm Beach, FL 33401
Phone 561 555-1212 Relationship

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Active Life Ledger: [Gene Ray](#)
[Emergency](#) [General](#) [Support People](#) [Medical](#) [Health Status](#) [Insurance](#)
[Financial](#) [Budget Planner](#) [Legal](#) [Funeral Planing](#) [Documents](#) [Physicians](#)

Documents

File Name	Date Uploaded	Uploaded By	View	Rename	Delete
Hello	18-Apr-01	Test Testerly	View This Document	Rename	Delete
Living Will.	02-Jul-01	Test Testerly	View This Document	Rename	Delete
m2_physicianso.gif	18-Apr-01	Test Testerly	View This Document	Rename	Delete
philstest.jpg	10-Jul-01	Test Testerly	View This Document	Rename	Delete

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Physicians

[Add](#)**Clay Williams**[Edit](#)**Joe Old's Hello**[Edit](#)

Specialty

Assign:
NO

Specialty

Assign:
NO

Address 1 123 Main

Address 1 PO Box 1530

Address 2 Suite 115

Address 2

City/ST/Zip West Palm Beach, FL 33401

City/ST/Zip Palm Beach Gardens, FL 33418

Phone 561 833-4040 Phone 2 no

Phone 561 555-1212 Phone 2

Note Hello! This is a pharmacy now too!

Note Leaky faucet. Call plumber.

Joe Friendly[Edit](#)**Phil Hello**[Edit](#)

Specialty

Assign:
NO

Specialty

Assign: **NO**

Address 1 123 Main St.

Address 1

Address 2 Suite 10

Address 2

City/ST/Zip Boca Raton, FL 33333

City/ST/Zip ,
Phone

Phone 561 555-1212 Phone 2 555-1212

Note What a great doctor!

Note This is a very friendly place! "

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FIG. 38

ElderIssues Member Forum

Note: Only ElderIssues.com subscribers can post to the forums.

[Post New Message](#)

Subject	By	Date Posted	Messages In Thread
Hello	John	30-May-01	1
progress	John	28-May-01	2
Party on	John	26-Apr-01	1
Whoa!	John	26-Apr-01	1
Hello There!	John	05-Apr-01	4
Hello!	John	05-Apr-01	3

About the Forum

Interact with fellow ElderIssues.com members by posting and reading messages. Messages you post will be viewable by other members who can reply at leisure. Check back to see if there are new replies to your message.

[Main Page](#) · [Forum](#) · [Chat](#) · [Access Control](#)Active Life Ledger: [Gene Ray](#) [Emergency](#)[General](#)[Support People](#)[Medical](#)[Health Status](#)[Insurance](#)[Financial](#)[Budget Planner](#)[Legal](#)[Funeral Planing](#)[Documents](#)[Physicians](#)

Chat

Share, learn and have fun with other members and their families as you discuss and solve family situations.

Communicate immediately with people from all over the world. You may join in public discussions in a room or talk privately to one person at a time -- like sitting in front of your computer and "talking" through typed messages with either one person or many other members!

[Chat Now](#)